



Statewide Petitions

The Basics of Receiving, Reviewing, Processing and Certifying Statewide Petitions

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Elections and Government Services

New Election Administrator Training - October 2015

Presentation Basics

- This presentation covers processing signatures on petition sheets that are received in your office.
- For a step-by-step walk through on setting up and processing statewide petitions in **MT Votes** and sending them to the SOS office, go to our website at the following:
<http://sos.mt.gov/Elections/Officials>.

Receiving Petitions

- Every sheet or set of up to 25 petition sheets submitted together must be accompanied by a **signature gatherer affidavit**.
- If affidavits are submitted at the bottom of a pile of petition sheets, contact the sponsor or signature gatherer to have them sort them out.
- You do not have to sort out which petitions belong with which signature gatherer – this is the responsibility of the sponsor and signature gatherer.

Affidavit of Signature Gatherer



Affidavit of Petition Signature Gatherer

An affidavit must be attached to each sheet or section submitted to the election administrator. Separate sheets of a petition may be fastened to this affidavit in sections of not more than 25 sheets.

AFFIDAVIT FILED WITH ELECTION ADMINISTRATOR

I, _____
(printed name of person who is the signature gatherer)

swear that I gathered the signatures on the petition to which this affidavit is attached on the stated dates, that I believe the signatures on the petition are genuine, are the signatures of the persons whose names they purport to be, and are the signatures of Montana electors who are registered at the address or have the telephone number following the person's signature, and that the signers knew the contents of the petition before signing the petition.

Date on which the first signature **attached** was gathered

*(Do NOT sign on the line below before gathering the signatures
on the petition(s) that you attach to this affidavit.)*

Signature of petition signature gatherer

Address of petition signature gatherer

City, state and zip code

NOTARY OR AUTHORIZED OFFICER – DO NOT FILL OUT THIS SECTION UNTIL AFTER THE SIGNATURES GATHERED HAVE BEEN ATTACHED TO THIS AFFIDAVIT

State of Montana

County of _____

Signed and sworn to before me this _____ day of _____, 20____ by _____
Printed Name of Signature Gatherer

**Where to file Petition and
Affidavit:**

County Election
Administrator's Office
A list of county election
offices may be found at:
sos.mt.gov/elections

Signature of Notary or Public Official

Printed Name of Notary Public

Notary Public for the State of _____

Residing at: _____

My commission expires: _____, 20____

[SEAL/STAMP]

Sample Petition Signature Sheet

						For County Election Office Use Only	
Training Note: Counted or Not?		Signature	Date Signed	Residence Address or P.O. Address or Home Phone	Printed Last Name, First and Middle Initials	Legis. Rep. Dist. #	Rsvd
1	Not counted: All information is illegible	Vladimir Putin	1-7	WpZzKwAa	AaKkAw		Signers do not fill in this section; it is for optional election office use only
2	Not counted: Not registered in Montana	Vladimir Putin	1-7	1 Crimea Way, Kiev, Russia	Putin, V		
3	Counted: Even though the signature on file is <i>Gerry Tall</i> , count if the signature on file, when taken as a whole, matches the one on file	G. R. Tall	1-7	100 South Western, Helena, MT 59601	Tall, G.R.		
4	Not counted: Elector provided no residence address, PO Box, or phone #	Skip Tracy	1-7		Tracy, S.M.		
5	Not counted: Attempted duplicate of Signature 3	G.R. Tall	1-7	100 South West, Helena, MT	Tall, G.R.		
6	Counted: Even though no town or city listed, as long as you can identify the voter	Sherry Bobbins	1-7	100 Mountain Ave.	S.C. Bobbins		
7	Not counted: Not registered in county indicated below.	Moe White	1-7	100 Yell Lane, Billings, MT	White, M. R.		
8	Counted: Even though address does not match address on file, since signature matches	Ed Anders	1-7	100 1st, Helena, MT 59101	Anders, E.		

Reviewing Signatures (continued)



- See preceding sample petition signature sheet for examples of issues with signatures on petitions:
 1. If the signature and other identifying information on the petition is illegible, the signature **cannot** be counted.
 2. If the signer is not registered to vote in Montana, nor in your county, the signature **cannot** be counted.
 3. If, for example, the person signed their registration card with their full name, but signs the petition with initials and their last name, **count** it if the signature taken as a whole is sufficiently similar to the one on file.

Reviewing Signatures (continued)



- See preceding sample petition signature sheet for examples of issues with signatures on petitions:
 4. If the signer provides neither an address nor a telephone number (one or the other must be provided), the signature **cannot** be counted.
 5. If the signer has already signed the same petition (duplicate signature), the second signature **cannot** be counted. MT Votes will flag a duplicate signature.
 6. If the signer provides a residence address but not the city or town, you can still **count** the signature unless there is another reason to reject it.

Reviewing Signatures (continued)



- See preceding sample petition signature sheet for examples of issues with signatures on petitions:
 7. If the signer is registered in a different county than your county, the signature **cannot** be counted.
 8. If the address or phone number provided by the signer does not match the one on file, but the signature matches and there is no other reason to disqualify the signature, you can still **count** the signature.

Reviewing Signatures (continued)

- Check each petition signature against the signature on file.
- You should **accept** a petition signature even if, despite minor technical issues, you believe that the signature is genuine.
- You should **not accept** a petition signature if there is a major technical issue or if, after your best efforts at signature verification, you believe it does not match the signature on file.

Reviewing Signatures (continued)

- You do **not** accept the signatures of **provisionally registered** electors, since they are not legally registered.
 - When you check a signature, MT Votes will show provisionally registered electors, but they are flagged as provisionally registered.
- You **accept** the signatures of **inactive** electors, since they are legally registered.
 - You do not automatically activate them based on their signing of the petition, although you can send them a voter registration application in order to assist them in activating.

Processing Petitions

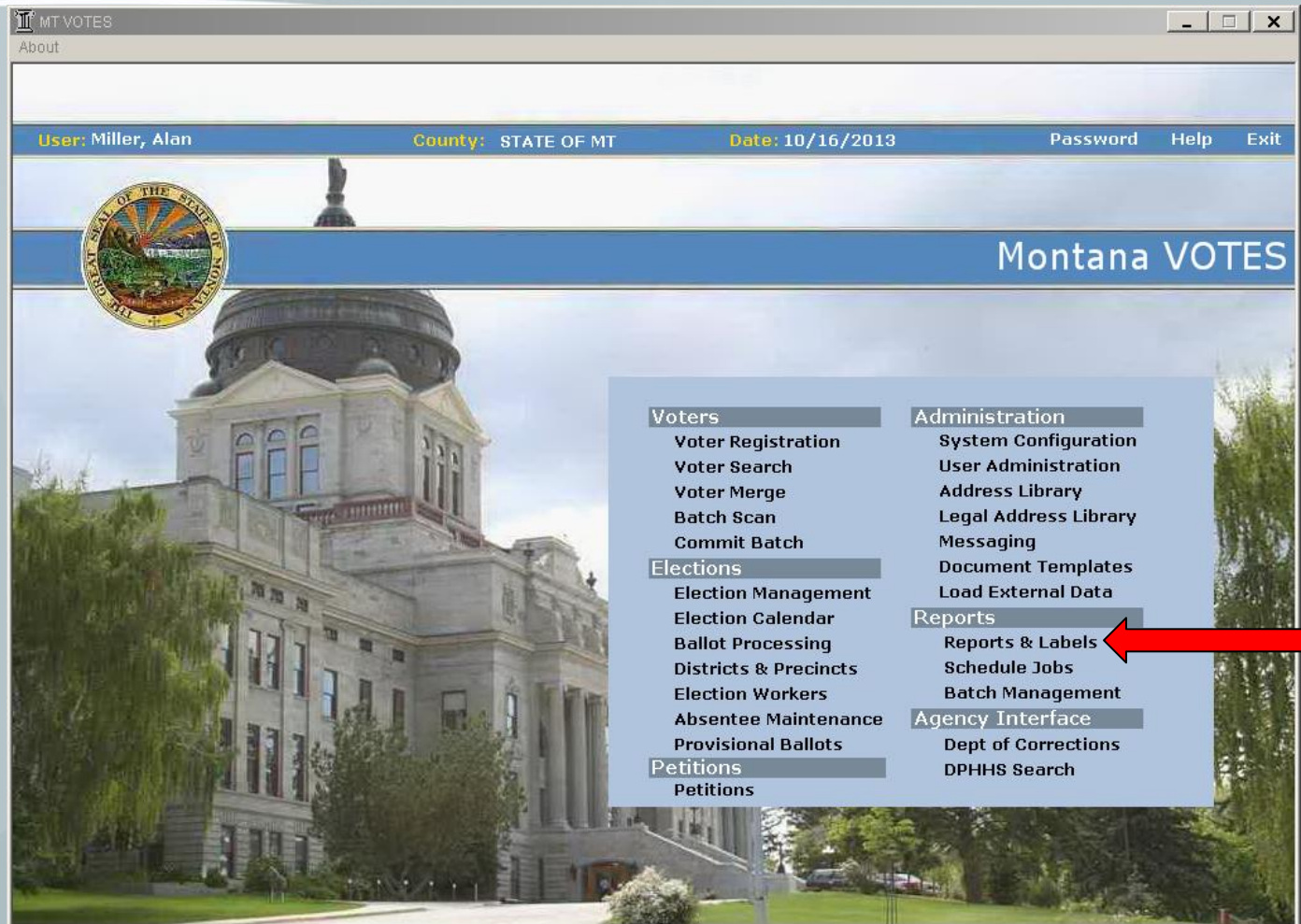
- When you receive petitions, keep them in the order that you receive them.
 - An exception is when you receive petitions and need to separate out certain submittals due to problems such as missing affidavits.
- In MT Votes, be sure to process as **one submittal** each petition sheet or set of up to 25 sheets submitted with **one affidavit**.
 - When you come to a new affidavit, even from the same signature gatherer, process it as a new submittal.

Certifying Petitions to Secretary of State



- Complete and send PM-009 petition certification report to the SOS (*see screen shots that follow this slide*).
- Remember to send PM-009 reports and the original certified statewide signed petitions with original affidavits to the Secretary of State's office by **certified** mail within 4 weeks of your receipt of them.
 - Before you send the original signed petitions, affidavits of signature gatherers and your certification(s), you **must** make copies to keep in your office.

PM-009 Petition Certification Reports



- To print the PM-009 certification of petitions, go to Reports and Labels in Montana VOTES.

PM-009 Petition Certification Reports (continued)

The screenshot shows the 'Reports' window of the PM-009 Petition Certification Reports software. The interface includes a left sidebar with navigation links, a main form area with various input fields and a list of reports, and a bottom section with buttons for file operations and report execution. Numbered arrows (1st through 6th) point to specific elements: 1st points to the 'Petitions' link in the sidebar; 2nd points to the 'PM-009 Petition Certification - Statistics by House District' report in the list; 3rd points to the 'Petition Type' dropdown menu; 4th points to the 'Petition Name' dropdown menu; 5th points to the 'Petition Submittals' checkbox area; and 6th points to the 'Run Report' button.

1st [Petitions](#)

2nd PM-009 Petition Certification - Statistics by House District

3rd Petition Type: Initiative / Referendum

4th Petition Name: Initiative Referendum No. 124

5th Petition Submittals: ☐ All Submittals

6th Run Report

CODE	NAME
PM-003	Petition Processing Statistics
PM-004	Petitions
PM-005	Petition Signers
PM-006	Petition Signature Statistics
PM-007	Petition Summary Results Verification
PM-008	Petition Signature Page Line Statistics
PM-009	Petition Certification - Statistics by House District
PM-010	Duplicate/Triplicate Signature For Petition
PM-011	Petition Signers / Changed Counties
PM-012	Unfinished Submittals

- In **Reports and Labels**, Click on "Petitions," then PM-009 Report, then choose the Petition Type and then Petition Name. Next, choose the submittals you wish to certify. Then click "Run Report." 14

PM-009 Petition Certification Reports

County: Yellowstone		Petition Certification - Statistics by House District		Date: 06/24/2014	
User Name: Patton, Susan				Report No.: PM-009	

To the Honorable Secretary of State of the State of Montana:

I, Bret Rutherford, Election Administrator, of the County of YELLOWSTONE, certify that I have examined the attached _____ sheets of the petition **I-174 - Initiative No. 174 - 05/29/2014** in the manner prescribed by law and I believe that _____

Petition Summary:

HouseDistrict No: <u>HD_043</u>	Total: 1
HouseDistrict No: <u>HD_046</u>	Total: 3
HouseDistrict No: <u>HD_051</u>	Total: 1
HouseDistrict No: <u>HD_054</u>	Total: 2
Grand Total: 7	

HouseDistrict No: <u>HD_043</u>	1	Signatures in Submittal	22
Total:	1		
HouseDistrict No: <u>HD_046</u>	3	Signatures in Submittal	22
Total:	3		
HouseDistrict No: <u>HD_051</u>	1	Signatures in Submittal	22
Total:	1		
HouseDistrict No: <u>HD_054</u>	2	Signatures in Submittal	22
Total:	2		
Grand Total: 7			

signatures are valid; and I further certify that the affidavit of the _____, or telephone number is _____

Date signed: 6-24-14 Susan Patton
Signature

SEAL

Montana VOTES

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Montana Secretary of State
2014 I-174 Ballot Box 333
Reviewed for statutory requirements
by CR
Tabulated 11/1 Signatures

YELLOWSTONE COUNTY
ELECTION
ADMINISTRATOR
MONTANA

- Remember to date and sign the above PM-009 report, affix the county seal, and make and keep a copy of the certifications, signed petitions and affidavits.

Where to Send Certified Petitions

- Send **original** petition sheets, **original** affidavits and the **original** PM-009 Certification Report by **certified mail** to:

Secretary of State

Attn: Alan Miller

PO Box 202801

Helena, MT 59620-2801

For Petition Questions



- If you are not sure of the answer to a **statewide** petition question, email soselections@mt.gov or call (406) 444-5346.
- For a **local** petition, refer to 7-5-101 through 7-5-140, MCA, and ask your city or county attorney for assistance. If they do not know the answer or are unsure, have them call our office's legal counsel at (406) 444-5375.